# **InforWorkflow**

Release 2.1

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Creates data migration flows

USAGE 1

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### **CHAPTER**

# **ONE**

# **INTRODUCTION**

InforFlow is a wrapper library to create Prefect based flows to migrate data from MS-SQL Sever to Infor M3.

In other words, it is using the Prefect library to create flows and uses the InforION library to tranform and load data to M3

### **INSTALLATION**

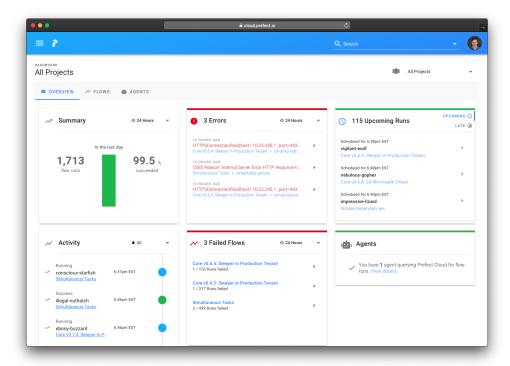
Firstly, Docker is an easy-to-install application for your Mac or Windows environment that can build and run packaged applications in containers and microservices on virtually any platform. In order to access and install the **inforion docker image**, so its availabe to use, please insert in your Terminal (MacOs) or Command Prompt (Windows):

docker run fellowconsulting/inforion

In any case, here you can access this link for more information about the inforion docker image:

### fellowconsulting/inforion Dockerhub

A modern, *web-based UI* is provided to facilitate use, in which the various data flows (transformation to load) can also be scheduled. This is the **Prefect.io UI** where we display the Workflows. Here is a quick look:



### 2.1 Docker Desktop

Another important point, is to have downloaded **Docker Desktop**, which depending on your working environment, Mac or Windows, you can download it from here:

Docker Desktop for Mac

Docker Desktop for Windows

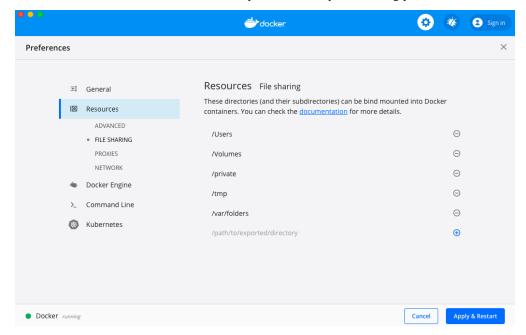
The important part about the **Docker Desktop** is that it allows you to access the required files to start running the prefect flows. That is why, firstly, you need to have access to the following files mentioned in "Prerequisites".

### 2.2 Prerequisites

But, before you start, it is important that you check if you have created a **conf directory**. These are necessary files to make *test loads*, as well as for the data extraction, trasnformation and load. So, In the directory you should have the following files:

- Mapping\_Kundenstamm.xlsx
- **credentials.yml**: Here you define the access to M3, the database with the respective data, the Prefect.io and Great Expectation environment.
- IONAPI Key File: Here the access to the APIs is provided.
- module\_dependencies.csv: Here the dependencies between different objects are defined: Module\_name and Parent\_module. These are also displayed in the UI.
- modules.csv: Here parameters are defined that are used to display and run the dataflows in the UI.

Another important prerequisite is that we add the *conf folder* (as seen above) as well as the *Great Expectations folder* to the **Docker Desktop**. It is as simple as opneing the Docker and getting into Resources, and next File Sharing, to add the new directories. When this is done, you can actually start testing your data loads with *Prefect flows*.



Just to finish this segment, here are some common and very important commands when starting and upgrading the inforion Docker image.

### 2.3 Start on Mac or Linux

docker run -v PWD/conf:/ion-workflow/conf fellowconsulting/inforion flow -b /ion-workflow/conf -c credentials.yml -m modules.csv -d module\_dependencies.csv

### 2.4 Start on Windows

docker run -v %cd%/conf:/ion-workflow/conf fellowconsulting/inforion flow -b /ion-  $\rightarrow$  workflow/conf -c credentials.yml -m modules.csv -d module\_dependencies.csv

### 2.5 Upgrade to Latest Build

docker pull fellowconsulting/inforion:latest

### THREE

### REQUIREMENTS

You need following information and documents before you can create flows

- Credentials
  - Access to MS-SQL Server
    - \* Server name
    - \* Username
    - \* Password
    - \* Source Database name (Database from which data will be transferred to M3)
    - \* Staging Database name (Database where data will store after transformation)
  - Access to Prefect cloud
    - \* Token for Prefect cloud
    - \* Project name
  - Access to M3
    - \* M3 URL
    - \* ION API File

All these credential informations should be provided in credentials.yml

• Modules information

For every module you want to export data from MS-SQL Server to M3 you need following information and add this to a csv file. Ideally it should be named **modules.csv**.

- Module name (You can put any name here. This is only used to create flows)
- Program name (This should be valid M3 program name where data will be exported)
- Mapping excel file path (Full path for the excel file which contains the sheet used for data tranformation)
- Sheet name (Name of the sheet which contains all the transformation information)
- Source table name: Table name from which data will be extracted.
- Stage table name: Table name where data will stored after transformation.
- Modules dependencies information

You should know if a module you are exporting already depends on another module. e.g. OrderLineItems is dependent on Orders and should be transferred after Orders are transferred. This

dependencies need to be provided in a csv file in a parent-child format, ideally named  ${\bf mod-ule\_dependencies.csv}$ 

**CHAPTER** 

### **FOUR**

### **HOW TO RUN**

InforFlow is available as a Docker instance.

Docker is a platform for running containers with prepackaged applications. It's a system that we are going to use for packaging and deploying different versions and microservices.

### 4.1 Install Docker on Windows

Install Docker Desktop on Windows.

#### **System Requirements:**

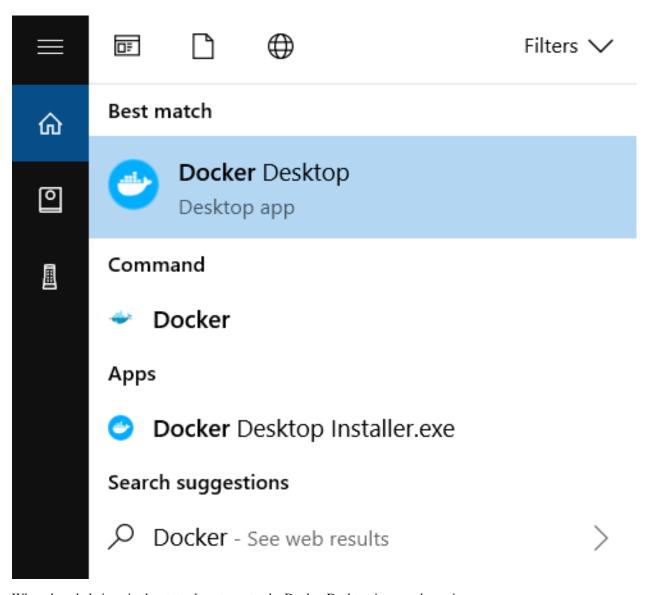
- Windows 10 64-bit: Pro, Enterprise, or Education (Build 16299 or later).
- Hyper-V and Containers Windows features must be enabled.
- The following hardware prerequisites are required to successfully run Client Hyper-V on Windows 10:
  - 64 bit processor with Second Level Address Translation (SLAT)
  - 4GB system RAM
  - BIOS-level hardware virtualization support must be enabled in the BIOS settings. For more information, see Virtualization.

#### **Installation:**

- 1. Double-click Docker Desktop Installer.exe to run the installer.
- 2. When prompted, ensure the Enable Hyper-V Windows Features option is selected on the Configuration page.
- 3. Follow the instructions on the installation wizard to authorize the installer and proceed with the install.
- 4. When the installation is successful, click Close to complete the process.

#### **Start Docker Desktop:**

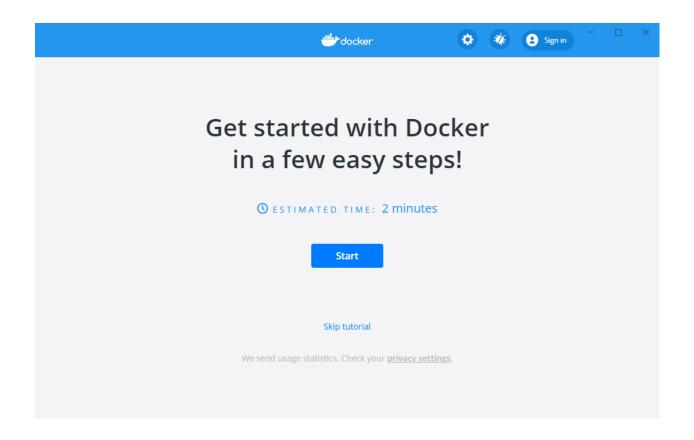
Docker Desktop does not start automatically after installation. To start Docker Desktop, search for Docker.



When the whale icon in the status bar stays steady, Docker Desktop is up-and-running.



Congrats! You are now successfully running Docker Desktop on Windows!



### 4.2 Install Docker on MacOs

Install Docker Desktop on Mac.

#### **System Requirements:**

- Docker Desktop macOS must be version 10.13 or newer, i.e. High Sierra (10.13), Mojave (10.14) or Catalina (10.15).
- Mac hardware must be a 2010 or a newer model.

#### **Installation:**

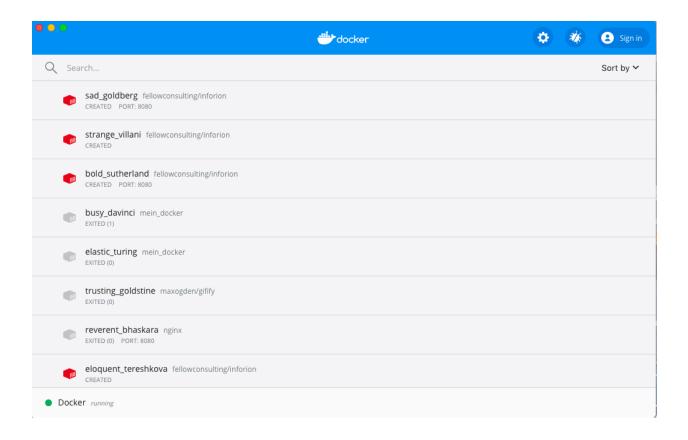
- 1. Double-click Docker.dmg to start the install process.
- 2. When the installation completes and Docker starts, the whale in the top status bar shows that Docker is running, and accessible from a terminal.



### Start Docker Desktop:

Open a command-line terminal, and try out some Docker commands.

- Run docker version to check that you have the latest release installed.
- Run docker run hello-world to verify that Docker is pulling images and running as expected.



# 4.3 How to create flows on Prefect cloud using Inforflow Docker instance

- with docker run you can run your image as a container
- -v we are mounting our local directory to docker container, so it can use files from this directory
- with **flow** we are adding the configuration files that are missing inside the Docker ecosystem

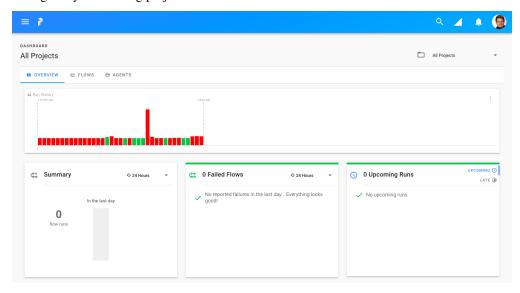
If you see something similar to the screenshot below, it means that everething is running how it should be.

```
Janiel JopesBoaniels-Naciook-Pro — % docker run -v /Users/daniel lopes/conf:/lon-workflow/conf fellowconsulting/inforion flow -b /ion-workflow/conf -c credentials.yml -m modules.cl sogio successfoll successfoll
```

Copy and paste one of the links that appear after running the Docker in your browser.

### 4.4 How to run flow from Prefect cloud

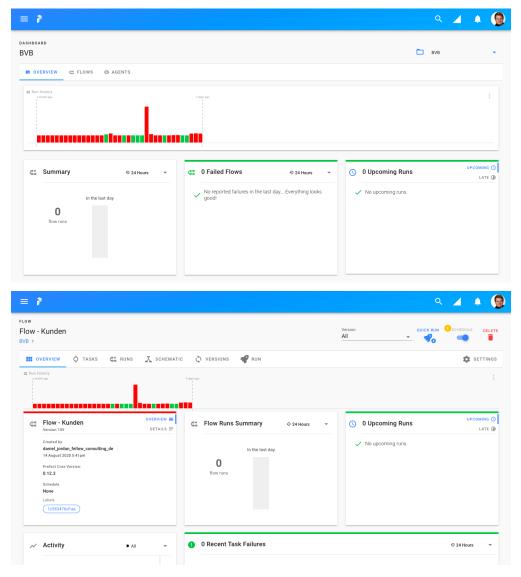
After clicking on the shown above link, you will be redirected to the Prefect main page - Dashboard. There you can manage all your existing projects.



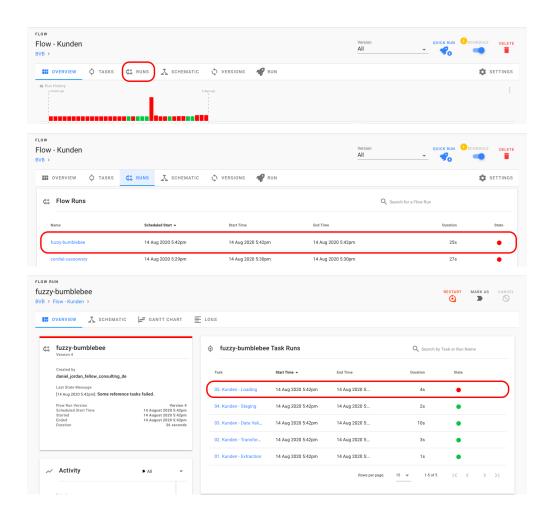
From there you can go to right side of the window to select your project and to manage all its dataflows. In this case we are going to enter the **BVB** project.



Now, you have entered the BVB project and you can start running flows. In order to do so, just enter **Flows** to see the available and on-going flows and to put as an example, we are going to work with **Flow-Kunden**.



After selecting the flow, there is on top right corner a **quick run** button to run the flaw. It will be executed and the error that might occur will show up with a description to see in which exact task it went wrong.



### **CHAPTER**

### **FIVE**

### **CONFIGURATION FILES**

InforFlow requires following 3 configuration files to run properly.

- Credentials (credentials.yml)
- Modules (modules.csv)
- Module Dependencies (module\_dependencies.csv)

### Credentials

Credentials file contains credentials for MS-SQL Server, M3 and Prefect Cloud.

- MS-SQL Server
  - Server name
  - Username
  - Password
  - Source Database name (Database from which data will be transferred to M3)
  - Staging Database name (Database where data will store after transformation)
- Prefect cloud
  - Project name
  - User token
  - Runner token
- M3
- M3 URL
- ION API File

### m3:

```
url: {{M3_URL}}
ionfile: {{ION_API_FILE_NAME}}
```

### database:

```
servername: {{SERVER_NAME}}
username: {{USER_NAME}}
password: {{PASSWORD}}
db_extraction: {{DB_EXTRACTION}}
db_staging: {{DB_STAGING}}
```

# prefect:

```
project_name: {{PREFECT_PROJECT_NAME}}
user_token: {{USER_TOKEN}}
runner_token: {{RUNNER_TOKEN}}
```

All these credential informations should be provided in yml format and file name should be provided in parameter when creating flow.

#### **Modules information**

For every module you want to export data from MS-SQL Server to M3 you need following information and add this to a csv file.

- Module name (You can put any name here. This is only used to create flows)
- Program name (This should be valid M3 program name where data will be exported)
- Mapping excel file path (Full path for the excel file which contains the sheet used for data tranformation)
- Sheet name (Name of the sheet which contains all the transformation information)
- Source table name: Table name from which data will be extracted.
- Stage table name: Table name where data will stored after transformation.
- Start: Start row for extraction [inclusive]. 1 means first row.

• End: End row for extraction [inclusive]. -1 means all records starting from start row. (Hint: This is not number of rows instead end row. e.g Start 2, End 6 means Rows 2, 3, 4, 5 and 6).

```
module_name, program_name, methods, mapping_file, sheet_name, source_table_name, stage_table_name, start, end
Kunden, CRS610MI, Add, BVB_Mapping_Kundenstamm.xlsx, Kunden,[dbo].[Customer_master_crs610], CRS610, 0, -1
```

All this information should be provided in csv format and file name should be provided in parameter when creating flow.

#### Modules dependencies information

This file contains dependencies informations. Like if a module in dependent on another module and should run only after parent module in migrated. e.g. OrderLineItems is dependent on Orders and should be transferred after Orders are transferred.

```
module_name, parent_module
Supplier Orders, Suppliers
Supplier Order Lines, Supplier Orders
```

This information should be provided in csv file in a parent-child format and file name should be provided in parameter when creating flow.

**CHAPTER** 

SIX

### **GREAT EXPECTATIONS INTEGRATION**

Infor Flow allows data validation using Great Expectations. Great Expectations uses a unique tool to automated testing, also known as "pipeline tests", which focuses on giving teams an analytical integrity and on helping with the management of complex codebases. Pipeline tests are like unit tests for datasets: they help you protect from upstream data changes and monitor data quality. Essentially it accelerates the ETL and data normalization process and automates verification of new data deliveries.

### 6.1 Creating Expectation Suites

To create expectation suites, user need to pass following 3 parameters

- Root directory for configurations
- Filename for YAML file containing credentials. e.g. credentials.yml
- Filename for CSV file containing modules information. e.g. modules.csv

```
docker run -v /local_path_to_conf_dir:/ion-workflow/conf -v /local_path_to_great_
-expectations_dir:/ion-workflow/great_expectations fellowconsulting/inforion great_
-expectation create -b /ion-workflow/conf -c credentials.yml -m modules.csv
```

- with **docker run** you can run your image as a container
- -v we are mounting our local directory to docker container, so it can use files from this directory
- with **create** we are telling the library to create great expectation suites

### 6.2 List Expectation Suites

To view all great expectation suites

```
docker run -v /local_path_to_conf_dir:/ion-workflow/conf -v /local_path_to_great_

-expectations_dir:/ion-workflow/great_expectations fellowconsulting/inforion great_

-expectation list -b /ion-workflow/conf -c credentials.yml
```

# **6.3 Update Expectation Suites**

To update great expectation suites

```
docker run -it -p 8080:8080 -p 8888:8888 -v /local_path_to_conf_dir:/ion-workflow/

→conf -v /local_path_to_great_expectations_dir:/ion-workflow/great_expectations_

→fellowconsulting/inforion great_expectation update -b /ion-workflow/conf -c_

→credentials.yml -s [suite_name]
```

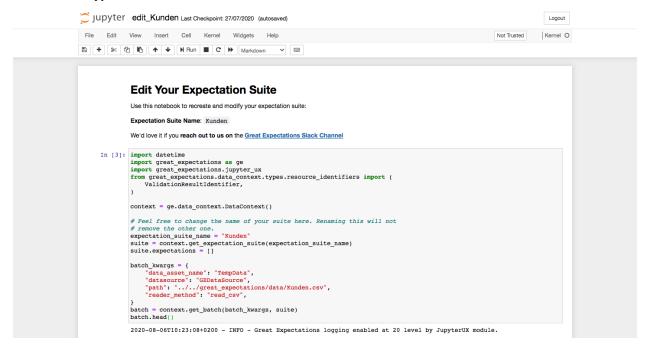
• with s we are telling which suite we want to update

### **GREAT EXPECTATIONS EXAMPLE**

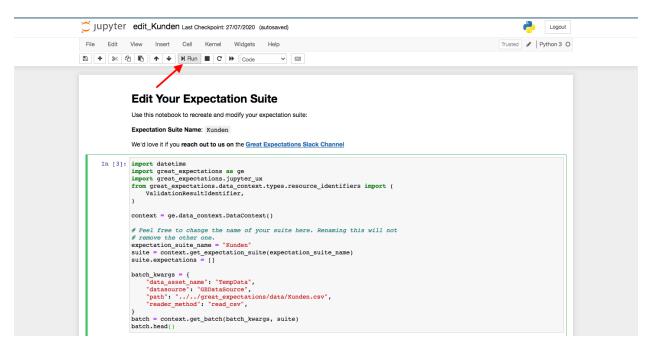
You can access Great Expectations by copying the last link provided by the outcome command (*Update Expectation Suites*). You should enter this link in your web browser to be able to acces **Jupyter Notebook**, an open-source web application. If you have entered as suitename, Kunden for example, you should get something like this:



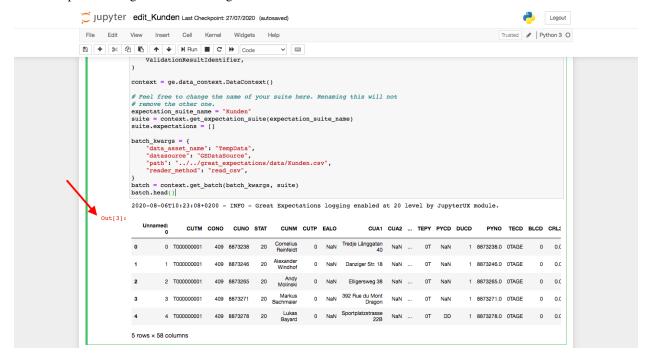
Now you can edit any of the shown above suites expectations. In this case, as an example, we are going to edit "edit\_Kunden.ipynb".



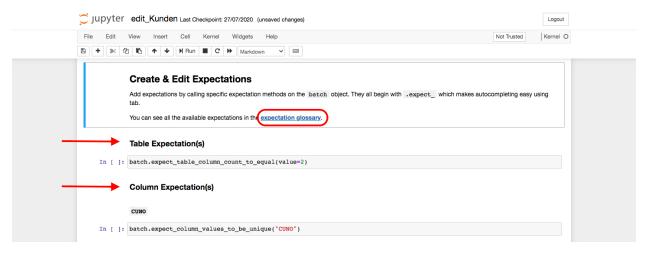
First of all, we are going to run the first input command to see the output data we get. Furthermore, it is an important first step, so you can get started with your customized creation and edit of new expectations. All you have to do is click on the upper part of the Jupyter Notebook, and run the first input, as shown below with the arrow.



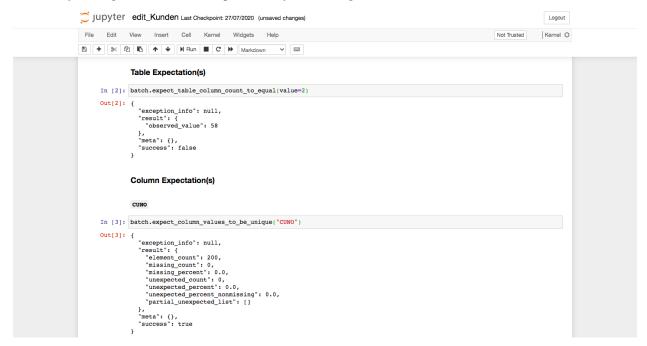
So the output that we get is the following one:

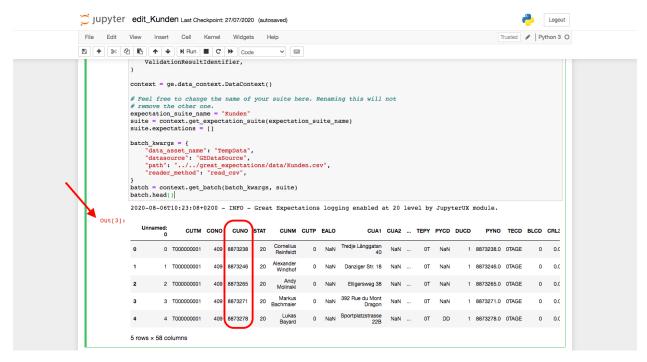


Now we can start creating and editing our desired expectations. Moving down to the next steps, we enter **Create & Edit Expectations**. It is important to know, that for any doubts or further explanations you can always check out the expectation glossary Nevertheless, you can see that you can put your new or modified expectation requirements in **Table expectations** (for tables) or **Column Expectations** (for each column).

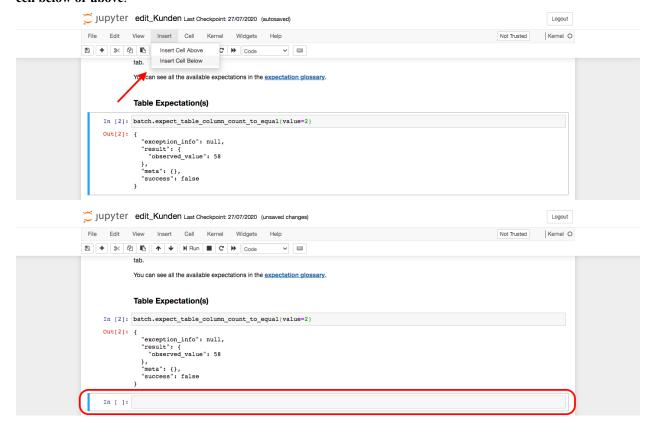


As an example, we are going to run a new *expectation* for **Column Expectations**, and what we want to do is to put a requirement for the column named "CUNO", so that all values are unique. You can always check out the existing columns by coming back to the first output, where your working data is.





Finally, in case you want to add more expectations (new cells), whether for tables or for columns, just be sure to be in the input row of *Table expectations*, for example. Then you can choose in the upper part of jupyter to **insert a new cell below or above**.



### **EIGHT**

### **COMMON ERROR MESSAGES**

#### Error 1

Generic exception. Firstly it will give you a string. If the error. Please contact the developer.

#### Error 2

The file file was not found or does not exist. Please check it.

#### Error 3

Credentials or module file is empty. Please make sure to have the proper information in the file.

#### Error 4

One of the column is empty in dependencies file. Please make sure to have the proper information in the file.

#### Error 5

The module name column must be unique. Each module can be dependent on a single module. Please make sure that the module name is only used once.

#### Error 6

The introduced URL is invalid. Please check and give a valid URL.

#### Error 7

Parameters in the file were not found.

#### Error 8

Required Column is missing.

### Error 9

The input was not a valid integer.

#### Error 10

Path provided for base directory does not exist.

### **CHAPTER**

# **NINE**

# **INDICES AND TABLES**

- genindex
- modindex
- search